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Stakeholder Journey Mapping: An Educational Tool for Social Entrepreneurs

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Abstract

While social entrepreneurship is a promising model for addressing social challenges, the success and sustainability of a venture is reliant on an entire stakeholder structure external to the entrepreneurial team. Across academic and professional programs, social entrepreneurship curriculum spends a great deal of time stressing this point; however thoroughly understanding a venture's stakeholder structure is difficult. Especially for novice teams in the early stages of venture development, current methods for collecting critical data points on the identities, needs, and motivations that shape a venture's stakeholder structure can be prohibitively difficult and expensive in terms of time and money. Programs need tools that empower aspiring social entrepreneurs by accounting for their unique needs and constraints without compromising results. In this article, Stakeholder Journey Mapping is presented as an adaptation of current customer journey mapping methods, capable of being an educational tool that lowers barriers and costs for new social entrepreneurs. A methodology for creating Stakeholder Journey Maps is presented in the form of a workshop plan, and is followed by a case study.

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1. Introduction

Social entrepreneurship is an increasingly popular model for addressing some of society's most immediate challenges, but like traditional for-profit ventures, they are dependent on profit generation for success and sustainability. Designing a social venture for profitability is difficult and is complicated by the involvement of critical stakeholder groups external to the entrepreneurial team. Academic and professional programs interested in training aspiring entrepreneurs spend a great deal of effort stressing the importance of determining the identities of a venture's stakeholders and considering them throughout the development process. Gaining an understanding of the stakeholder structure around a social venture helps design for their needs and increases confidence that the proposed value propositions, market penetration strategies, business model, etc. will be profitable in context. Many of the formal tools to support gathering stakeholder data today have been borrowed from traditional private sector applications.

In traditional for-profit ventures, the largest groups of stakeholders are customers and/or consumers. Numerous methodologies, frameworks, and models have been designed to facilitate the processes of conducting research, contextualizing, and mobilizing customer insights during various stages of a venture's lifecycle and planning. However, for aspiring social entrepreneurs seeking insights about a venture's stakeholder structure, these tools have too narrow a scope and are often prohibitively expensive in terms of time and money. In this article, Constructed Stakeholder Personas—pre-constructed archetypal profiles of critical stakeholder groups—are activated through a process of Stakeholder Journey Mapping.

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Stakeholder Journey Mapping, an adaptation of customer journey mapping, broadens its scope beyond customers/consumers to include all the relevant stakeholder groups that influence a venture's profitability. Through the use of Constructed Stakeholder Personas, it lowers barriers to research and insight generation and makes the tool accessible to entrepreneurs who are heavily burdened by time constraints, limited funding, and few opportunities to travel or work onsite in the early stages of venture development.

This article reviews existing customer journey mapping practices, introduces Stakeholder Journey Mapping as a new educational tool, and ultimately proposes a methodology and case study for delivering a team-oriented Stakeholder Journey Mapping workshop.

2. Review: Customer Journey Mapping

Customer journey mapping – also known as user journey mapping, customer experience mapping, user scenario mapping, or customer lifecycle mapping – is a visualization tool used to gain insight about how customers interact with a business. The tool has seen a sharp increase in use over the last five years in both the private and public sector—across businesses, consulting and designing firms, and government agencies. Practitioners across the board have suitably acknowledged the potential of customer journey mapping to reveal customers' real and latent needs and to improve business by making sure that every experience a customer has with a product, service, or brand is as positive as possible. When used well, customer journey mapping can augment traditional approaches to customer insights research and evaluation and bring ventures closer to their customers [1, 2, 3, 4, 5, 6]. While there is no standardized approach or methodology for customer journey mapping, a survey of current practitioners and an evaluation of surrounding literature revealed four universal traits: (1) a team-oriented execution, (2) a highly visual non-linear nature, (3) the use of touch-points, and (4) an emphasis on real customers and consumers.

The team-oriented nature of journey mapping, coupled with a visual approach for organized discussion, has four major benefits. First, collaboration has the potential to create positive team dynamics and strengthen mutual commitment to execution of the project. According to several practitioners, the visual nature of journey mapping facilitates active participation and listening within a diverse group where members have various strengths and weaknesses and prefer different communication methods. For example, while many modern communication methods, such as email, texting, instant messaging, and phone or video conferencing, rely heavily on written and verbal communication, creating visuals stimulates visually-oriented participants to articulate their thoughts and insights in ways other than through written or spoken word. In this way, the visual nature of journey mapping encourages participants who would otherwise be discouraged, and directly facilitates team diversity [7]. Working with a diverse team (in terms of discipline, culture, learning styles, and/or orientation) is more likely to spark ideas and generate more creative approaches than brainstorming with a homogenous group [8]. Second, creating visualizations also promotes creativity and divergent thinking among participants and encourages productive dialogue and debate [7]. Third, the creation of visuals allows teams to address the complex non-linear nature of customer journeys and promotes system-level thinking. It also proves the importance of context as situations are allowed to intertwine and interconnect. Some practitioners frame this dynamism as the most important component of their map. Lastly, the final visual product allows observers to quickly digest the system overview of a given customer's journey and can easily be used as a communication tool.

Touch-points, which are simply the points at which customers interact with a business, serve as the foundation of journey mapping. Although practitioners disagree about exactly when to define touch-points during the mapping process—some believe touch-points should be defined before mapping so that they can be used as navigation points, while others believe touch-points should emerge naturally throughout the process— all agree that they function as a critical part of mapping the customer journey. The Institute of Design at Stanford described touch-points in the following example: imagine an innovator is tasked with designing a new aspect to attract customers to a particular coffee shop; if the sole understanding is that people get coffee and then they drink it, the innovator has missed out on many different steps and stages in between [9]. By following the journey through a customer's eyes, journey maps are able to see all the touch-points that a customer sees which leads to a more meaningful understanding of the context.

Finally, practitioners emphasize the importance of collecting as much primary data about the real experiences of customers and end consumers as possible. They use tools including video, focus groups, mystery shoppers, direct observation, and customer personas to collect data and use journey mapping to bring that data to life. This allows current practitioners to augment the scope of customer insights research and evaluation tools and put the real demographic, psychographics, and geographic variables at play in customers' lives at the core of decision-making. When used well, this is the ultimate key to identifying the real and latent needs inherent in customers' lives and thereby developing products and services that not only meet needs but also generate sustainable demand.

Despite its increasing popularity in industry, customer journey mapping has seen only a modest uptake in the educational space which is limited in scope. Several firms have been established to teach students and professionals how to use journey mapping and take it back to their respective projects, but there are no significant instances of journey mapping being used as a tool to facilitate learning and discovery. The nuance is this: in the first instance, students are learning to mobilize and analyze their understandings of customer insights in a new way, and in the second instance, educators are using journey mapping to teach the concept of customer insights and illustrate the importance of placing them at the core of business development. This allows

educators to illustrate the principles of human-centered design and systems thinking while simultaneously providing students a practicum for interacting with these concepts.

3. Stakeholder Journey Mapping as an Educational Tool

To reach its full potential as an educational tool for social entrepreneurs, Stakeholder Journey Mapping must overcome two major limitations. First, Stakeholder Journey Mapping must expand its scope to include the entire stakeholder structure of a venture. This is important because focusing on customers alone creates an incomplete picture of how key stakeholders—customers, end users, influencers, manufacturers, partners, etc.—experience a venture over the course of its lifecycle. To learn to properly analyze and plan for the development of their social venture, aspiring social entrepreneurs must gather insights on all their important stakeholder groups. This information allows entrepreneurs to practice examining, interacting with, and planning for every key interaction and touch point.

In order to build productive maps that can unlock insights, aspiring social entrepreneurs must have access to organized geographic, demographic, and psychographic insights about their venture's stakeholder groups. Collecting this data in the form of in depth interviews, focus groups, surveys, etc. can be very expensive in terms and money and is often cost prohibitive to inexperienced social entrepreneurs working in the early phases of venture development. To make Stakeholder Journey Mapping an assessable educational tool, this methodology suggests the burden for data collection be shifted away from aspiring entrepreneurs onto the educators/experts that are tasked with designing curriculum for them. To accomplish this, students are provided data in the form of Constructed Stakeholder Personas—archetypal profiles that have been pre-constructed by educators or other experts. Since the experiences of stakeholder groups can dramatically affect their relationship with a company, understanding the dynamic nature of stakeholder groups through Constructed Stakeholder Personas allows entrepreneurs to more accurately represent their journeys. As Tincher [9] explains, trying to combine the journeys of different segments “creates a diluted map that applies to no one”. In order to view the journey of a single stakeholder group, aspiring social entrepreneurs need a way to empathetically align themselves with that segment.

4. Stakeholder Journey Mapping Workshop Methodology

The following methodology is founded in the best practices of customer journey mapping but is adapted to include the wider stakeholder structure and specifically consider the constraints of aspiring social entrepreneurs by utilizing Constructed Stakeholder Personas. The workshop presented in the following section is designed to be completed in teams of five to ten students over the course of three hours and leads them through the process of: (1) identifying stakeholder through the use of Constructed Stakeholder Personas, (2) understanding the influences that impact the stakeholders' decision-making and purchasing habits, (3) defining their venture's possible touch-points for all stakeholders, (4) predicting pain-points and opportunity-points, and (5) developing action strategies to avoid failure. It is further hoped that with deeper reflection into these direct insights, students will be able to: (1) articulate clear value propositions for each addressable market segment and stakeholder and (2) identify market penetration and partnership strategies.

4.1. Establishing a Baseline

To set the context for Stakeholder Journey Mapping, entrepreneurs must outline a brief narrative summary of their venture using the following three-step format. First, entrepreneurs will develop a basic description of the venture, including venture name, location(s), and current stage in the business lifecycle according to Fig. 1. Following this, it is critical to define the market opportunity of the venture. This includes noting unmet needs, opportunities, and market trends at the focus of the venture. Finally, the products and services offered by and planned to be offered by the venture should be organized according to location.

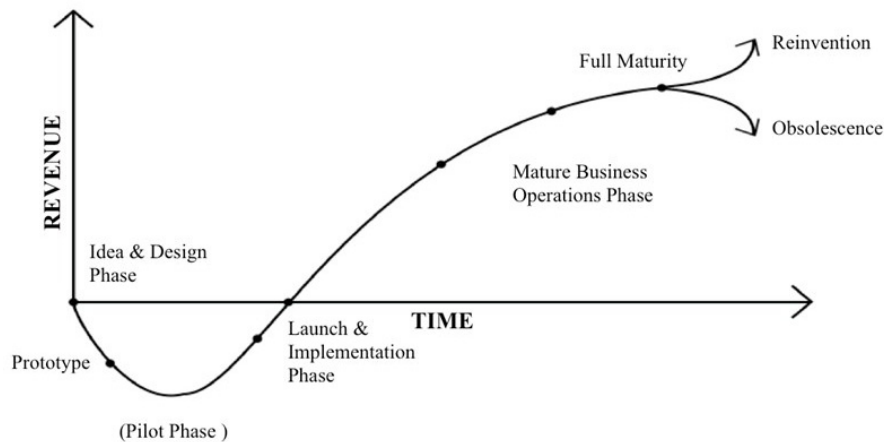


Fig. 1. Business lifecycle.

4.2. Select and Characterize Key Stakeholder Groups

While it can be difficult to identify the stakeholders for a venture early on, understanding these key participants is critical to success. Workshop facilitators should have a collection of Constructed Stakeholder Personas for participants to review. A methodology for creating Constructed Stakeholder Personas can be found in the preceding article Constructed Stakeholder Personas: An Educational Tool for Social Entrepreneurs.

4.3. Define Stakeholder Groups

It is important to understand as many geographic, demographic, and psychographic details as possible about relevant stakeholder groups. However, in order for segmentation (completed in the previous process of creating the Constructed Stakeholder Personas) to be a useful tool for a venture, segments must be defined in the terms that are most meaningful to the venture. By studying the geographic, demographic, and psychographic variables at play, trends can be identified. Participants are asked to review the complete set of Constructed Stakeholder Personas and select the all groups that apply to their venture. Most personas will stand independently; however, it is possible that two or more personas could be combined in an evolution of the existing personas. If this is the case, participants should be reminded that segments must be (1) definable: the definition should include enough detail that it describes a collection of people with specific characteristics in common; and (2) meaningful: each characteristic chosen should meaningfully relate to the segment's interest, need, and ability to buy the product/service. Participants should continue with the Constructed Stakeholder Persona set they curated for their venture and discard the rest. Each remaining persona represents one of their main stakeholder groups.

4.4. Research via Constructed Stakeholder Personas

The most important benefit of a Stakeholder Journey Map is activation of insights around the dynamic aspects of a venture's stakeholder groups per the geographic, demographic, and psychographic detail expressed through the Constructed Stakeholder Personas. It's essential that social entrepreneurs identify the variables that influence their stakeholder groups' interactions their venture and inform their motivations and real and latent needs. Workshop participants are asked to study each persona within their set to uncover pertinent details about each group. To start, participants can be asked to follow the research flow detailed in Table 1. Further research may follow.

Table 1. Geographic, Demographic, and Psychographic Research Flow

1. Geographic Variables	
a.	Geographic Area Served
i.	Country, province, district, city, etc.
b.	Language
i.	Language(s) by which your stakeholders communicate
c.	Currency
i.	Currency name
ii.	Conversion rate
iii.	Stability
iv.	Common payment methods (check, cash, mobile payments, barter)

d.	Population Density	i.	Urban, suburban, rural, total population if possible
e.	Nature of Retail	i.	Where/how will your venture buy inputs?
		ii.	Where/how will your product/service be sold?
f.	Quality of Transport Infrastructure	i.	Quality, efficiency, reliability, and cost of commercial transportation, i.e. how easily will you be able to transport inputs?
		ii.	Quality of private transportation, i.e. how easily can your retailers/customers travel to make purchases?
g.	Quality of Communication Infrastructure	i.	Quality and reach of advertising platforms, telecommunications, internet, etc.
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2. Demographic Variables			
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a.	For Individuals		
	i.	Age	1. Age range
	ii.	Income	1. Income range
	iii.	Gender	1. Male, female, transgender, other, all
	iv.	Occupation	
	v.	Family Status	1. Single, married, divorced
			2. Number of children or dependents
	vi.	Education Level	1. Specific level or range
	vii.	Cultural Orientation	1. Membership to an ethnic/religious group?
	viii.	Asset Ownership	1. Home, land, cattle—what is indicative of wealth and status?
	ix.	Access to Capital A	1. Access to personal savings, ability to access traditional or non-traditional finance
b.	For Organizational Groups		
	i.	Sector	
	ii.	Years in Operation	
	iii.	Total Revenue	
	iv.	Reach	1. Primary and branch locations
	v.	Nature of Engagement	1. Licensing your ventures technology, etc.
	vi.	Method of Payment	1. How will they pay you, over what time period?
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3. Psychographic Variables			
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a.	Goals	i.	The person's/organization's goals, not only related to a venture but in life
b.	Purchasing Patterns	i.	Who makes the purchasing decisions, handles the money, and actually acquires goods/services?
		ii.	How do they make purchases?
c.	Behavioral Patterns	i.	The activities, habits, or actions the stakeholder goes through daily/weekly/monthly/yearly, and how this effects the way they buy/interact with a product/service
d.	Expertise	i.	Do they feel they need experience to interact with a product/service?
e.	Timing	i.	How do they function over the course of a year, i.e. the effects of seasonal changes?
f.	Cultural Elements	i.	Does this stakeholder identify with ethnic or religious groups?
		ii.	If so, how does it impact the way they make decisions
		iii.	Are issues associated with not belonging to a certain group?
		iv.	Are there any issues of stigmatization to be aware of?
		v.	Are there any positive or negative connotations associated with certain products as a result of culture?
g.	Attitudes and Values	i.	What's important to them?
		ii.	What do they value? Why?
		iii.	What makes a good relationship in their mind? Why?
h.	Constraints	i.	Do they face any constraints or tensions that prevent them from operating the way they would like to? Why?
i.	Decision Criteria	i.	What's important to this stakeholder when making a decision?
		ii.	What slows down or prevents the decision making process?
		iii.	Are there any other barriers?

4.5. Map the Journey of Each Stakeholder Group

Information gathered through investigating the Constructed Stakeholder Personas is curated across the x-axis of the journey map in five stages: (1) awareness, (2) informational gathering, (3) decision making, (4) purchase, and (5) aftersales. The journey stages can be defined by their goals as found in Table 2. These stages can be augmented according to the unique needs of a venture, but it's not necessary. The initial group of five is inclusive enough to capture sufficient information across different ventures.

Table 2. Journey Stages

REF #	Stage: Goal
1	Awareness: Understand what possibilities
2	Information Gathering: Learning
3	Decision Making: Setting criteria for final purchase decision
4	Purchase: Complete purchase
5	After-sales: Receive training & support as needed

Each stage of the journey map is further broken down along the y-axis of the map to include the following components under each stage: (1) goals, (2) actions, (3) touch-points, (4) feeling, (5), pain-points, and (6) key insights. Definitions for each component can be found in Table 3.

Table 3. Critical Points in Stakeholder Journey Mapping

REF #	Component
1	Stage (Awareness, Information Gathering, Decision-Making, Purchase, Post-Sales)
2	Goals
3	Action (Courses for a venture to either avoid pain-points or achieve opportunity points)
4	Touch-points (Points where the venture and stakeholder connect)
5	Feeling (Criteria for determining if points in the journey are in the pain or opportunity-point category)
6	Pain Points (Points in the journey that could harm a venture)
7	Opportunity Points (Points in the journey that could help a venture)
8	Key Insights

Participants are asked to visually record their findings in relation to the stages and components of the journey map in a visual way. An example can be found in Fig. 2.

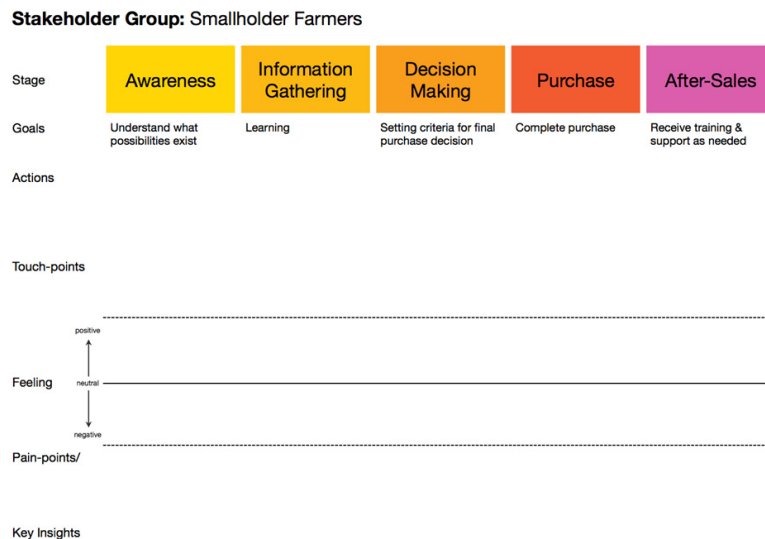


Fig. 2. Stakeholder Journey Mapping Template

Journey maps also give insight into the emotional state of a stakeholder group throughout their journey. This metric, not normally captured by quantitative data alone, is critical when it comes to emphatically understanding a stakeholder groups' motivations and real/latent needs. The feeling component of the map captures the stakeholder groups' emotional state throughout the journey and is key to identifying pain-points and opportunity-points. While not necessarily points in the journey where

stakeholders make contact with a venture, these points represent moments that could help a venture succeed or harm it to the point of failure. Aspiring social entrepreneurs should pay special attention to these points to amplify positive experiences where possible and diminish the effects of pain-points where needed.

When participants complete the journey maps for all their stakeholder groups, they should take time to analyze the maps with special attention to touch-points, pain-points, and opportunity-points. This data gives important insight into a venture's proposed value propositions, market penetration strategies, business model, etc. with low (or even neutral) satisfaction scores indicating elements of a venture may that not valid within the context of a particular stakeholder group. This information can be used to inform a venture's development throughout different stages of the venture lifecycle.

In the idea stage, before a pilot program has been launched, a journey map can be created using predicted data and used as a market-driven validation tool or way to predict and address pain-points prior to launch. During or after the launch phase, journey mapping can express the reality of how stakeholder groups interact with a venture, indicate pain-points, and point out opportunities for improvement and growth.

There are four aspects to validating a venture plan: concept, technology, market, and usability. The information from a Stakeholder Journey Maps should provide entrepreneurs with the insight needed to answer the common questions about concept validation, technology validation, market validation, and usability. Example questions are given in Table 4.

Table 4. Example Questions for Analysis of a Stakeholder Journey Map

1. Concept Validation	
a.	Does the persona understand the product/service?
b.	Does the persona think the venture will be successful in their context?
c.	Does the product address the need it was designed it to address?
d.	Can the persona afford the product/service?
2. Technology Validation	
a.	Is the product/service actually better and cheaper than what the persona currently has? If so, by how much?
b.	Will the persona have access to the technology/infrastructure/resources they need to be successful? Is it reasonable?
c.	Does the persona have the technical background needed to access and appreciate the product/service?
3. Market Validation	
a.	Does the product/service <u>really</u> solve a <u>real</u> problem?
b.	Do enough stakeholder groups value the product/service for the venture to be economically sustainable?
c.	Is the market reachable? Physically? What about feasibility of promotion and advertising?
d.	Does the venture really have a competitive advantage? What is it?
e.	Will the venture's income be consistent/seasonal; can the venture sustain itself?
f.	How much room is there to scale up the venture?
4. Usability	
a.	How easy is it for the persona to become aware of the product/service?
b.	How easy is it for the persona to gain access to the venture's service?
c.	How easy it is for the persona to dispose of the product/unsubscribe from the venture's service?
d.	How easy is it for the persona to repurchase?

5. Case Study: Agricultural Ventures in Sub-Saharan Africa

A Stakeholder Journey Mapping Workshop was delivered to three design teams in the Humanitarian Engineering and Social Entrepreneurship program at the Pennsylvania State University, an academic program that gives students real, professional experience in designing technologies for resource-constrained settings. These teams are all organized around the same innovation: an affordable greenhouse venture poised for launch in Sierra Leone. They used a set of Constructed Stakeholder Personas for agricultural technology ventures. The workshops were delivered according to the methodology above and required two and a half hours to complete.

Initial feedback from participants indicated that the Constructed Stakeholder Personas, while not a replacement for in-depth ethnographic research, did provide enough insight into the dynamic variables inherent in the lives of specific stakeholder groups to be an effective tool in terms of stakeholder selection, and the identification of touch-points, pain-points, and opportunity-points. Workshop participants in every team indicated that the personas were a unique and helpful part of the workshop and enabled them to uncover new insights. Additionally, teams were asked if they could identify what their ventures' value propositions were for each stakeholder at the beginning and end of the workshop. All three teams demonstrated an increased ability to articulate their ventures' market segments and value propositions by the end of the workshop. Finally, although the first team identified its stakeholders and end users and used that choice throughout the workshop, the second two teams made changes to their original stakeholder/end user selections as they uncovered more information. An example journey map for the Smallholder Farmer Constructed Stakeholder Persona (Appendix A) can be found in Figure 3. Other important stakeholders to consider have been discussed previously [11].

Stakeholder Group: Smallholder Farmers

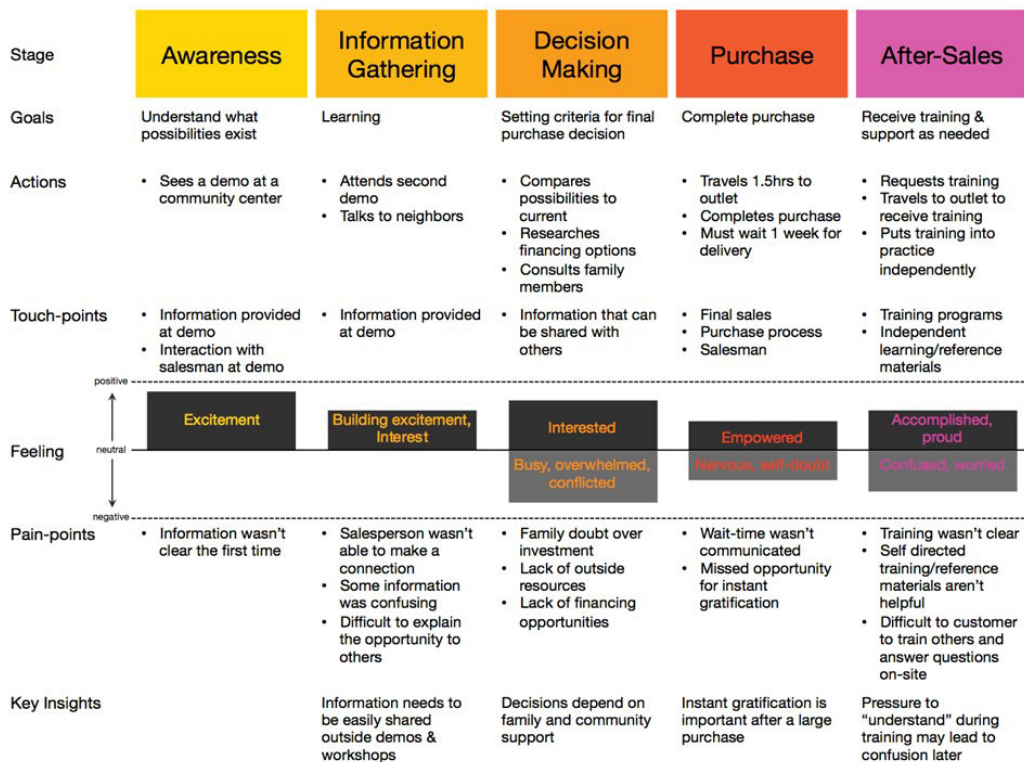


Fig. 3. Stakeholder Journey Map for the Smallholder Farmer Constructed Stakeholder Persona

6. Further Testing

Although the persona-based Stakeholder Journey Mapping workshop was successful in preliminary tests, further testing is needed to validate its efficacy. It is expected that a full review of the workshop would be testing conducted in structured environments with the guidance of an experts or educators. One of the main questions moving forward relates to the Constructed Stakeholder Personas. It must be examined whether the personas push new social entrepreneurs to generate closed world assumptions based on the limited examples of individuals and organizations featured in the personas. These questions and others can be tested by evaluation through programs with focus similar to Humanitarian Engineering and Social Entrepreneurship program and reported back.

7. Conclusion

The Stakeholder Journey Mapping workshop appears to be of value as an educational tool in the social entrepreneurship space. Preliminary testing suggests that the workshop can accomplish its direct and indirect goals of: (1) stakeholder and potential end-user identification, (2) greater understanding of important abiotic stressors and contextual elements, (3) touch-point identification, (4) pain-point and opportunity-point prediction, (5) action strategies development. Further, the workshop may also help participants develop market penetration and partnership strategies, but this finding was neither directly supported nor contradicted.

Appendix A. Smallholder Farmer Constructed Stakeholder Persona

Smallholder Farmer

"Smallholder farmer, head of the household & mother of six"



Blessing, N.

Female, 35

Married, 6 children

A Day in the Life

Blessing, the head of her household and mother of six, lives in a rural village and earns money through smallholder farming. Every morning, she gathers water, then returns home to help her oldest daughter cook a small meal, do the wash, and care for the family's chickens and goats. She then sends her younger children to school. When she is not working the small plot of land where she grows pineapples, she is at her home where other women gather, gossip, and socialize. She sells her pineapples locally, and though she would like to expand doesn't have the know-how or credit needed to do so.

Personality

Traits/Attitudes

Hard working, family oriented, happy, welcoming, loves to laugh, gossip, and dance. She identifies strongly with her community, but is very welcoming to outsiders.

Goals

Expand her farming operation (in size or diversity of crops) to generate additional income and improve her family's nutrition. She would also like to purchase a water system and a blender for her home.

Motivations

Religion (Christian), her husband, children, new baby, community membership, and future purchases.

Purchasing Habits

Location/Travel

While there is one small shop in Blessing's village, it only sells bottled soft drinks and packaged foods. Blessing makes most of her purchases from traveling sales-women who pass by her home (many of whom are from her community). When something specific is needed she asks one of her children to get it.

Finances & Decision Making

Although Blessing's husband controls the household's finances, Blessing decides on the family's frequent purchases and she and her oldest daughters are in charge of procurement. Blessing's income is very low so she faces extreme financial constraints and cannot access credit.

Purchasing Patterns

Because Blessing depends on agriculture for her income, she makes yearly purchases of agriculture inputs for her farm. Her other cyclical purchases revolve around her children's schooling. She is fairly risk adverse in purchases and does not try new products frequently.

Education, Skills, & Training

Blessing went to school through second grade, and has learned her farming techniques from her mother and other community figures and has been farming the same way for years. She does not use irrigation or fertilizer on her land. She learns most of her new skills from her sister who lives next to her with her own family and also farms. Trust and relationships are extremely important.

Design Criteria

Must:

- Low-cost
- Ease of procurement/delivery
- Easy to use/intuitive
- Beneficial for overall family
- Status appeal (cannot detract from social status)
- New products must come from trusted source
- Large projects need approval of Chief, ceremonial start
- Religiously benign

Must Not:

- Reference to counter culture/stigmatized activities
- Interfere with time dedicated to other activities
- Require technical expertise
- Require knowledge of English
- Interfere with household dynamic (children, and livestock run free)
- Require purchases in bulk

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